



2022 Conference & AGM program

Last updated June 17, 2022

Sunday, May 1, 2022 (3:00 pm – 9:30 pm ET)

3:00 pm – 4:30 pm ET

The generational divide: legacy and opportunity

- **Todd Fithian**, Co-Founder & CEO, The Legacy Companies

For many financial advisors, the idea of succession planning is a bit foggy. Regardless of if you're a younger advisor in the prime of your career with a long runway ahead of you, or if you're on the back nine looking at the next 10 years or less, it's a lot to wrap your head around.

Today's session is not just about succession planning as much as it is about making sure you're fully engaged with your biggest client relationships and across generations. In Todd's career, he has had far too many calls from advisors expressing to him that their client has died, and they can't get the spouse who is holding onto a big cheque to call them back. There are many problems with this statement alone, and the hard reality is that the cheque has almost certainly gone to another advisor already.

Join Todd Fithian for this interactive session where he will share industry leading approaches designed to get you ahead of these potential challenges, and not only secure your seat at the head of the advisory table with these key relationships, but also build a Legacy - one that is worth succession!

Available to:

- In-person: yes
- Virtual: no
- On-demand recording: yes

CE credits available, subject to course approval (T = tentative)

- Institute for Advanced Financial Education (Advocis) – 1.50
- FP Canada – 1.50
- Alberta Insurance Council – 1.00
- Insurance Councils of Saskatchewan – 1.50
- Insurance Council of Manitoba – 1.50
- Chambre de la sécurité financière (Québec) – 1.00



5:30 pm – 6:00 pm ET

New Members' Reception

By invitation only

Available to:

- In-person: yes
- Virtual: no
- On-demand recording: no

6:00 pm – 7:00 pm ET

Opening reception

Available to:

- In-person: yes
- Virtual: no
- On-demand recording: no

7:00 pm – 8:30 pm ET

Opening banquet

Available to:

- In-person: yes
- Virtual: no
- On-demand recording: no

8:30 – 9:30 pm ET

A conversation with Hon. Lisa Raitt

- **Hon. Lisa Raitt, P.C.**, Vice-Chair, Global Investment Banking, CIBC Capital Markets
- **Moderator: Cindy David, CFP, CLU, FEA, TEP**, President & Estate Planning Advisor, Cindy David Financial Group LTD

Join us in the evening for an insightful interview style session between The Hon. Lisa Raitt, P.C. and Cindy David, President & Estate Planning Advisor, Cindy David Financial Group Ltd.



Available to:

- In-person: yes
- Virtual: yes
- On-demand recording: no

CE credits available, subject to course approval (T = tentative)

- Institute for Advanced Financial Education (Advocis) – 1.00 (T)
- FP Canada – 1.00
- Alberta Insurance Council – 0.50
- Insurance Councils of Saskatchewan – 1.00
- Insurance Council of Manitoba – 1.00
- Chambre de la sécurité financière (Québec) – 1.00 (T)

Monday, May 2, 2022 (8:00 am – 7:30 pm ET)

8:00 am – 9:00 am ET

Breakfast and networking

9:00 am – 9:30 am ET

CALU 2022 Welcome

- **Catherine Clark**, Professional Master of Ceremonies, Catherine Clark Communications Inc
- **Kelly Adams, B. Comm., CLU, ChFC, CFP, FEA**, Vice-Chair, CALU Board of Directors; Chair, CALU 2022 Conference & AGM; Chairman, Barrington Wealth Partners Inc.; Principal, Adams Wealth Advisory Inc.

Available to:

- In-person: yes
- Virtual: yes
- On-demand recording: no

CE credits available, subject to course approval (T = tentative)

- Institute for Advanced Financial Education (Advocis) – 0.50
- FP Canada – 0.00
- Alberta Insurance Council – 0.00
- Insurance Councils of Saskatchewan – 0.00
- Insurance Council of Manitoba – 0.00



- Chambre de la sécurité financière (Québec) – 0.00

9:30 am – 10:30 am ET

Get big things done: The power of connectional intelligence

- **Erica Dhawan**, Award winning keynote speaker & author

We typically associate success and leadership with smarts, passion and luck. But in today's hypercompetitive world, even those gifts aren't enough. Strategist Erica Dhawan argues that the game changer is a thoroughly modern skill called connectional intelligence (CxQ). As radical a concept as emotional intelligence was in the 90s, connectional intelligence is turning people into superconnectors who accelerate innovation, break down silos and foster breakthrough top and bottom line impact.

This dynamic, engaging, high-energy, fast-paced keynote will help participants understand the practice of using connectional intelligence as the key to professional success and leadership in the 21st century. Attendees will learn new insights and tools to accelerate the connected power of teams, become more agile and innovative, and drive breakthrough ideas and outcomes.

Learning outcomes include:

- How anyone can excel not just through skills and smarts, but through connectional intelligence.
- Keys to leveraging your networks and connections, and creating contagious positive results.
- Successful tactics used to address connectional overload and in changing turbulent times.
- How leaders create deep connections of fierce loyalty and respect from their team and customers.
- How connectionally intelligent leaders outperform the competition and create remarkable results.

Available to:

- In-person: yes
- Virtual: yes
- On-demand recording: no

CE credits available, subject to course approval (T = tentative)

- Institute for Advanced Financial Education (Advocis) – 1.00
- FP Canada – 1.00
- Alberta Insurance Council – 1.00
- Insurance Councils of Saskatchewan – 1.00
- Insurance Council of Manitoba – 1.00
- Chambre de la sécurité financière (Québec) – 1.00 (T)



10:30 am – 11:00 am ET

Networking and refreshment break

11:00 am – 12:00 pm ET (Concurrent workshops I)

Insurance masterclass: Client conversations

- **Jeremy Reinbolt, CLU, CIM**, President & Chief Financial Advisor, Videre Financiers Inc.
- **Barry Pascal, MFA-P, TEP, FEA**, Partner, Bell Pascal Insurance Services
- ~~Laura Klachn, CLU, CFP, TEP, CDFA, CHS~~, President, Vision Financial Partners Inc.
- **Dana Mitchell, CLU, CFP, CHS**, Certified Financial Planner, Basis Wealth
- **Moderator: Cindy David, CFP, CLU, FEA, TEP**, President & Estate Planning Advisor, Cindy David Financial Group LTD

A soft session on highlights from four producers on techniques they use to engage clients in the need for planning. These are either a series of questions, anecdotes, expressions or ideas that each of the advisors have used repeatedly in their practice that has proved to be successful in moving cases along. This session will have a cross section of diverse advisors who will share a snippet of what they have found to consistently resonate with their target clients and prospects over the years.

Practical; Intermediate

This workshop is organized by the Life Insurance Issue Group.

Available to:

- In-person: yes
- Virtual: no
- On-demand recording: yes

CE credits available, subject to course approval (T = tentative)

- Institute for Advanced Financial Education (Advocis) – 1.00
- FP Canada – 1.00 (T)
- Alberta Insurance Council – 1.00
- Insurance Councils of Saskatchewan – 1.00
- Insurance Council of Manitoba – 1.00
- Chambre de la sécurité financière (Québec) – 1.00

Ethics and social media: To post or not to post

- **Rod Burylo**, Director, Board Advisor, Consultant
- **Moderator: Michael Noc, CLU, CFP, CH.F.C., CIM**, Financial Planner, MTM Wealth Planning Ltd. / iA Private Wealth



Rod Burylo will discuss timely topics related to ethics and professional responsibility with respect to technology and the financial services industry. Rod's session will feature a focus on how to assess the appropriateness of social media behavior of advisors and financial services organizations.

Practical; Advanced

This workshop is organized by the Wealth Creation & Management Issue Group.

Available to:

- In-person: yes
- Virtual: no
- On-demand recording: yes

CE credits available, subject to course approval (T = tentative)

- Institute for Advanced Financial Education (Advocis) – 1.00
- FP Canada – 1.00
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- Insurance Councils of Saskatchewan – 1.00
- Insurance Council of Manitoba – 1.00
- Chambre de la sécurité financière (Québec) – 1.00

High-Net-Worth living benefit opportunities exist?!

- **Russell Shaw**, Senior Director Individual Life and Health New Business Operations, RBC Insurance
- **Jason Boudreau, CLU, CFP**, Principal, VELA Wealth Management Inc.
- **Moderator: Tracy To, B.Sc, CLU, CEA**, Director of Sales, Sun Life

Do misconceptions around the challenging nature of Living Benefits insurance deter advisors from talking to clients about it? This session aims to dispel myths and help advisors identify missed opportunities in their book of business. Join this discussion to hear about situations where advisors have led the way in protecting the wealth of high net worth individuals with living benefit solutions and gain insights that can be incorporated into your client's holistic financial plans.

Case study; Intermediate

This workshop is organized by the Living Benefits Issue Group

Available to:

- In-person: yes
- Virtual: no
- On-demand recording: yes

CE credits available, subject to course approval (T = tentative)



- Institute for Advanced Financial Education (Advocis) – 1.00
- FP Canada – 1.00
- Alberta Insurance Council – 1.00
- Insurance Councils of Saskatchewan – 1.00
- Insurance Council of Manitoba – 1.00
- Chambre de la sécurité financière (Québec) – 1.00

12:00 pm – 12:45 pm ET

Lunch

12:45 pm – 1:30 pm ET

Annual Meeting of Members

Available to:

- In-person: yes
- Virtual: yes
- On-demand recording: no

1:30 pm – 1:45 pm ET

Networking break

1:45 pm – 2:45 pm ET

Post-pandemic economic and financial outlook

- **Stephen Poloz**, Special Advisor, Osler; Former Governor of the Bank of Canada
- **Moderator: Robert Houle, BA, MPA, CFP, CLU, CH. F.C, RPA**, Vice President, Capcorp Financial

Economic and financial forecasting has rarely been as challenging as it seems today. Even as COVID-19 continues to upend our lives, there are other tectonic forces acting on the global economy that will disrupt the economy long after the pandemic is behind us. Population aging, rapid technological progress, and the transition to net zero carbon emissions will have profound implications for our future, some of them unforecastable. Combined with exploding indebtedness and rising income inequality, these forces have the potential to create historic outbreaks of economic and financial volatility, as they have done in the past. Drawing from his new book, *The Next Age of Uncertainty*, Stephen Poloz will explain how these same forces have interacted to produce major historical events, such as the Victorian Depression of 1873-96, the Great Depression of the 1930s, the Great Inflation of the 1970s, and the Global Financial Crisis of 2008. Understanding how these dynamic forces will factor into the post-pandemic outlook will help individuals, investors, and companies adapt to a riskier future.



Available to:

- In-person: yes
- Virtual: yes
- On-demand recording: no

CE credits available, subject to course approval (T = tentative)

- Institute for Advanced Financial Education (Advocis) – 1.00
- FP Canada – 1.00
- Alberta Insurance Council – 1.00
- Insurance Councils of Saskatchewan – 1.00
- Insurance Council of Manitoba – 1.00
- Chambre de la sécurité financière (Québec) – 1.00 (T)

2:45 pm – 3:00 pm ET

Networking and refreshment break

3:00 pm – 4:00 pm ET

Risk, loss, legacy

- **Brent Peacock, BA, CHS**, Partner, Peacock Sheridan Group
- **Brian McGuire, BA, CFP**, Partner, Peacock Sheridan Group
- **Moderator: Roger Sinclair, CFP**, Partner, SBW Wealth Management

Advisors talk to their clients about risk all the time. It might be related to their estate or business succession plans, and sometimes it's about the impact they make across generations, and how to protect that legacy. Yet how often do they look in the mirror about their own affairs? In March 2019, their firm was put to the test when Brent received a phone call from a mutual friend, while on holidays, that would change their lives forever.

Their close friend, business partner and long-time CALU member, Grant Sheridan, was in a coma that he might never recover from. Unable to communicate with Grant for the better part of 4 months, you can imagine the enormous strain this put on their business, his clients, his friends, and most importantly his family. All of their planning was put to the test in an instant, with no dress rehearsals. This fear of loss became a devastating reality when Grant passed away on July 28, 2019 at the age of 47.

Join moderator and former CALU chair, Roger Sinclair, alongside Brent Peacock and Brian McGuire as they share their impactful and emotional story. They will share not only what they learned through this process, but what they and the team did to ensure the business survived this crippling loss, and how they are thriving today.

Available to:

- In-person: yes



- Virtual: yes
- On-demand recording: no

CE credits available, subject to course approval (T = tentative)

- Institute for Advanced Financial Education (Advocis) – 1.00
- FP Canada – 1.00
- Alberta Insurance Council – 1.00
- Insurance Councils of Saskatchewan – 1.00
- Insurance Council of Manitoba – 1.00
- Chambre de la sécurité financière (Québec) – 1.00

4:00 pm – 4:30 pm ET

An address by the Hon. Candice Bergen

- **The Hon. Candice Bergen, P.C., M.P.**, (Portage-Lisgar, Manitoba), Leader of the Official Opposition, Interim leader of the Conservative Party of Canada
- **Moderator: Kate Pal, B.Comm, CLU, CFP, FEA, CHS**, Pal Insurance Services Limited

This session will feature an address by the Leader of the Official Opposition, the Hon. Candice Bergen, who will discuss the priorities of the Conservative Party of Canada including its vision of economic growth for Canada, affordability and building a strong economy for the future in areas such as the small business sector and Canada's retirement and healthcare systems.

CE credits available, subject to course approval (T = tentative)

- Institute for Advanced Financial Education (Advocis) – 0.50 (T)
- FP Canada – 0.50 (T)
- Alberta Insurance Council – 0.50 (T)
- Insurance Councils of Saskatchewan – 0.50
- Insurance Council of Manitoba – 0.00
- Chambre de la sécurité financière (Québec) – 0.00

5:30 pm – 7:30 pm ET

Parliamentary and networking reception

Available to:

- In-person: yes
- Virtual: no
- On-demand recording: no



Tuesday, May 3, 2022 (8:00 am – 4:15 pm ET)

7:30 am – 9:00 am ET

Pancakes and Politics

Breakfast is included

- **Daniel Blaikie, M.P.**, Member of Parliament for Elmwood—Transcona (Manitoba), NDP Critic for Finance, Member of the Standing Committee on Finance
- **The Hon. Ed Fast, P.C., M.P.**, Member of Parliament for Abbotsford (British Columbia), CPC Shadow Minister for Finance, Member of the Standing Committee on Finance
- **Julie Dzerowicz, M.P.**, Member of Parliament for Davenport (Ontario), Liberal Member of the Standing Committee on Finance
- **Moderator: Robert McCullagh, CFP, CLU, CH.F.C, RHU**, Secretary-Treasurer, CALU Board of Directors; Financial Advisor, Benefit Planners Inc.

Join us for breakfast for a tripartite panel discussion with Julie Dzerowicz, LPC, Hon. Ed Fast, CPC, who are both members of the Standing Committee on Finance and Daniel Blaikie, NDP to capture their different points of view on the financial sector and their party's economic priorities.

Available to:

- In-person: yes
- Virtual: no
- On-demand recording: yes

CE credits available, subject to course approval (T = tentative)

- Institute for Advanced Financial Education (Advocis) – 1.00 (T)
- FP Canada – 1.00
- Alberta Insurance Council – 1.00
- Insurance Councils of Saskatchewan – 1.00
- Insurance Council of Manitoba – 1.00
- Chambre de la sécurité financière (Québec) – 0.00

9:00 am – 9:15 am ET

Advocis update

- **Rob Eby, CFP, RRC**, Chair, Advocis, The Financial Advisors Association of Canada; Executive Financial Consultant, Rob Eby & Associates Private Wealth Management

Available to:

- In-person: yes



- Virtual: yes
- On-demand recording: no

CE credits available, subject to course approval (T = tentative)

- Institute for Advanced Financial Education (Advocis) – 0.25
- FP Canada – 0.00
- Alberta Insurance Council – 0.00
- Insurance Councils of Saskatchewan – 0.00
- Insurance Council of Manitoba – 0.00
- Chambre de la sécurité financière (Québec) – 0.00

9:15 am – 10:15 am ET (Concurrent workshops II)

Stop Frankensteining it

- **Cindy Radu**, Family Wealth Transition Advisor, Cindy Radu Advisory Ltd.
- **Moderator: Steve Meldrum CLU, CFP**, Corporate Insurance Specialist, Swell Private Wealth

Family enterprises require more than technical expertise. They seek true collaboration across multiple disciplines which can be achieved only when there is a proper discovery process. There is no space for a Frankenstein approach anymore when helping family enterprises. This session will shift your mindset and reveal the background to the trend of family offices and best practices of working with and for them.

Practical; Intermediate

This workshop is organized by the Life Insurance Issue Group.

Available to:

- In-person: yes
- Virtual: no
- On-demand recording: yes

CE credits available, subject to course approval (T = tentative)

- Institute for Advanced Financial Education (Advocis) – 1.00
- FP Canada – 1.00
- Alberta Insurance Council – 1.00
- Insurance Councils of Saskatchewan – 1.00
- Insurance Council of Manitoba – 1.00
- Chambre de la sécurité financière (Québec) – 1.00

The future of work (CANCELLED)

- **Heidi Hauver, CHRE, CPHR, CCP**, Vice President, People Experience, Shinydocs
- **Moderator: Ian Burns**, Partner, David Burns & Associates



This workshop will feature a disability claims expert in conversation with an HR manager. It aims to assist employers, employees and advisors navigate changes in the employment landscape. Heidi Hauver, Vice President, People Experience, Shinydocs, alongside Moderator Ian Burns, Partner, David Burns & Associates will be bringing you first-hand tips on how to evolve, adapt and change with the times with practical knowledge that will be easily integrated in our group advisors practice.

Technical, Practical; Intermediate

This workshop is organized by the Employee Benefits Issue Group.

Available to:

- In-person: yes
- Virtual: no
- On-demand recording: yes

CE credits available, subject to course approval (T = tentative)

- Institute for Advanced Financial Education (Advocis) – 1.00
- FP Canada – 1.00
- Alberta Insurance Council – 1.00
- Insurance Councils of Saskatchewan – 1.00
- Insurance Council of Manitoba – 1.00
- Chambre de la sécurité financière (Québec) – 1.00

Long Term Care Insurance is gone, what's next?

- **Jennifer Jacobs, CLU, CFP, CHS, RHU, IFIC**, Insurance Consultant, LTCI Consulting Inc.
- **Chris Riddell, CLU, CHS**, Partner, Wise Riddell Financial Group

The Long Term Care market has disappeared in Canada but the need is higher than ever. This interview style presentation will address the alternatives solutions and shifts in recommendations to make sure this risk is considered and protected.

Practical; Intermediate

This workshop is organized by the Living Benefits Issue Group.

Available to:

- In-person: yes
- Virtual: no
- On-demand recording: yes

CE credits available, subject to course approval (T = tentative)

- Institute for Advanced Financial Education (Advocis) – 1.00



- FP Canada – 1.00
- Alberta Insurance Council – 1.00
- Insurance Councils of Saskatchewan – 1.00
- Insurance Council of Manitoba – 1.00
- Chambre de la sécurité financière (Québec) – 1.00

10:15 am – 10:30 am ET

Networking and refreshment break

10:30 am – 11:30 am ET

The greatest leaders do things differently

- **Jean François Ménard**, Mental Performance Coach and Bestselling Author

The best leaders are lifelong learners. They embrace challenges and sharpen their skills purposefully. Over time, they find ways to evolve from being ordinary leaders to extraordinary leaders. We all know the best leaders are not born this way – they are made! These individuals are constantly followed by others and for good reason. They care about others, generate enthusiasm and support those who need it. The best leaders are masters of doing the small things right. Learn why great leaders act outside-the-box, have impact on others and find solutions in problematic situations.

Key takeaways:

- Strategies for dealing with energy vampires in your environment.
- How to challenge the status quo and step out of the box.
- Techniques to make your message stick.

Available to:

- In-person: yes
- Virtual: yes
- On-demand recording: no

CE credits available, subject to course approval (T = tentative)

- Institute for Advanced Financial Education (Advocis) – 0.50
- FP Canada – 1.00 (T)
- Alberta Insurance Council – 1.00
- Insurance Councils of Saskatchewan – 1.00
- Insurance Council of Manitoba – 1.00
- Chambre de la sécurité financière (Québec) – 1.00 (T)



12:00 pm – 12:45 pm ET

Lunch

12:45 pm – 1:45 pm ET

Tax landscape: CRA-Finance roundtable

- **Mélanie Beaulieu**, Director, Financial Industries and Trusts, Canada Revenue Industry
- **Andrew Donelle**, Senior Director, Tax Legislation, Finance Canada
- **Lauchlin MacEachern**, Director, Domestic Corporations and Resource Income, Tax Legislation, Finance Canada
- **Trevor McGowan**, Director General, Tax legislation, Department of Finance
- **Bob Naufal, CPA**, Manager, Financial Institutions Section, Income Tax Rulings Directorate, Canada Revenue Agency
- **Angela Ross, TEP, LL.B.**, Principal, Tax Services, PricewaterhouseCoopers LLP
- **Kevin Wark, LL.B, CLU, TEP**, Tax Advisor, CALU

Join us as senior representatives from the Canada Revenue Agency and Department of Finance respond to general and specific questions posed by CALU members relating to their views of tax policy and legislation, technical interpretations and audit-related issues that will be of interest to CALU members and their clients.

Tax portrait: Making sense of the roundtable

- **Angela Ross, TEP, LL.B.**, Principal, Tax Services, PricewaterhouseCoopers LLP
- **Kevin Wark**, Tax Advisor, CALU

After laying out the landscape in the roundtable, join our speakers again to dive deeper into the session and answer a handful of questions with more detail, including examples, as well as any questions that may have been overlooked.

Available to:

- In-person: yes
- Virtual: yes
- On-demand recording: no

CE credits available, subject to course approval (T = tentative)

- Institute for Advanced Financial Education (Advocis) – 1.50 (T)
- FP Canada – 1.50
- Alberta Insurance Council – 1.50
- Insurance Councils of Saskatchewan – 1.50
- Insurance Council of Manitoba – 1.50



- Chambre de la sécurité financière (Québec) – 1.00

2:15 pm – 2:45 pm ET

Networking break

2:45 pm – 3:45 pm ET

Insights from disruptors

- **Tarsem Basraon**, Co-founder, Planworth
- **Carlos Benfeito**, Chief Technology Officer, Breathe Life
- **Charlie Conron**, President, Life Design Analysis
- **Moderator: Jake Sheehan, CLU, FEA**, Advisor, Life Design Systems

Available to:

- In-person: yes
- Virtual: yes
- On-demand recording: no

CE credits available, subject to course approval (T = tentative)

- Institute for Advanced Financial Education (Advocis) – 1.00 (T)
- FP Canada – 1.00 (T)
- Alberta Insurance Council – 1.00 (T)
- Insurance Councils of Saskatchewan – 0.00
- Insurance Council of Manitoba – 1.00
- Chambre de la sécurité financière (Québec) – 1.00 (T)

4:30 pm – 5:30 pm ET

Founding & Charter Members reception

By invitation only. This special reception for Founding & Charter Members of CALU will take place in Daly's on the third floor of The Westin Hotel.



Wednesday, May 4, 2022 (8:00 am – (TBD) ET)

8:00 am – 9:00 am ET

Breakfast and networking

9:00 am – 10:00 am ET (Concurrent workshops III)

Best practices for leveraging with life insurance

- **Chris Ireland, CPA, CA, TEP**, Senior Vice-President, Planning Services, PPI Advisory
- **Moderator: James W. Kraft, CLU, CFP, CH.F.C., TEP, CPA, CA, M. Tax**, Advisor, BMO Financial Group

The session will review best practices when leveraging with life insurance. Information provided will include case studies, how to best meet a client's needs, the best approaches to appropriately present the strategies to clients, the dos and don'ts for terminology, and key practice protection points for insurance advisors.

Technical, Case Study; Advanced

This workshop is organized by the Life Insurance Issue Group.

Available to:

- In-person: yes
- Virtual: no
- On-demand recording: yes

CE credits available, subject to course approval (T = tentative)

- Institute for Advanced Financial Education (Advocis) – 1.00
- FP Canada – 1.00
- Alberta Insurance Council – 1.00
- Insurance Councils of Saskatchewan – 1.00
- Insurance Council of Manitoba – 1.00
- Chambre de la sécurité financière (Québec) – 1.00

Disability & mental health learnings through COVID and beyond

- **Mark Foerster, MBA, CFP**, Consultant, Empire Life
- **Adam Kelly**, Executive Vice President & Chief Commercial Officer, CloudMD Software & Services Inc.
- **Moderator: Mike McClenahan, GBA**, Vice President, Partner Solutions, Benefits by Design Inc.

This session will provide a deeper understanding of the factors (COVID, mental health, etc.) driving disability trends. Further, the presenters will outline tools that are available to you and your customers to help mitigate



these risks and assist employers with developing resiliency for their employees. Finally, we will have some discussion on challenges and opportunities for our industry to seek better outcomes for plan members.

Technical, Practical; Intermediate

This workshop is organized by the Employee Benefits Issue Group.

Available to:

- In-person: yes
- Virtual: no
- On-demand recording: yes

CE credits available, subject to course approval (T = tentative)

- Institute for Advanced Financial Education (Advocis) – 1.00
- FP Canada – 1.00
- Alberta Insurance Council – 1.00
- Insurance Councils of Saskatchewan – 1.00
- Insurance Council of Manitoba – 1.00
- Chambre de la sécurité financière (Québec) – 1.00

Tips and traps for Canadians with U.S. 401(k)s and IRAs

- **Kim G.C. Moody, FCPA, FCA, TEP**, CEO, Moodys Tax/Moodys Private Client
- **Moderator: Laura Money, CLU, CFP, CHS**, Senior Financial Planner, Coutts Financial Services Inc. (Sun Life)

Help your clients bring their savings home! In this session, the aim is to help you understand how to repatriate your clients' US deferred income plans, such as IRAs & 401(k)s. Kim Moody will walk you through the considerations prior to initiating a transfer and the steps that need to be taken to do so as tax efficiently as possible.

Technical, Case Study; Advanced

This workshop is organized by the Wealth Creation & Management Issue Group.

Available to:

- In-person: yes
- Virtual: no
- On-demand recording: yes

CE credits available, subject to course approval (T = tentative)

- Institute for Advanced Financial Education (Advocis) – 1.00
- FP Canada – 1.00
- Alberta Insurance Council – 1.00
- Insurance Councils of Saskatchewan – 1.00
- Insurance Council of Manitoba – 1.00



- Chambre de la sécurité financière (Québec) – 1.00

10:00 am – 10:30 am ET

Networking break

10:30am – 11:30 am ET

The world according to accountants

- **James MacGowan, FCPA, FCA, TEP**, Tax expert; Retired from Deloitte
- **Kelly Adams, B. Comm., CLU, ChFC, CFP, FEA**, Vice-Chair, CALU Board of Directors; Chair, CALU 2022 Conference & AGM; Chairman, Barrington Wealth Partners Inc.; Principal, Adams Wealth Advisory Inc.

This presentation will look at how accountants perceive insurance advisors, how to deal with accountants and be a better advisor as a result. The presentation will also deal with certain tax planning strategies using insurance.

Available to:

- In-person: yes
- Virtual: yes
- On-demand recording: no

CE credits available, subject to course approval (T = tentative)

- Institute for Advanced Financial Education (Advocis) – 1.00
- FP Canada – 1.00
- Alberta Insurance Council – 1.00
- Insurance Councils of Saskatchewan – 1.00
- Insurance Council of Manitoba – 1.00
- Chambre de la sécurité financière (Québec) – 1.00 (T)

11:30 am – 12:30 pm ET

Meet the Producers

- **Kate Pal, B.Comm, CLU, CFP, FEA, CHS**, Pal Insurance Services Limited
- **Jeremy Reinbolt, CLU, CIM**, President & Chief Financial Advisor, Videre Financiers Inc.
- **Mark Therriault, CFP, CIM, CSC**, Partner, Nicola Wealth Management
- **Moderator: Murray Neilson, CFP, CLU, CH.F.C., FEA**, Business Development, Nicola Wealth Management

Available to:

- In-person: yes
- Virtual: yes



Conference &
AGM
MAY 1-4, 2022
Leadership matters

Conférence et
AGA
1-4 MAI, 2022
Le leadership, ça compte

- On-demand recording: no

CE credits available, subject to course approval (T = tentative)

- Institute for Advanced Financial Education (Advocis) – 1.00 (T)
- FP Canada – 1.00 (T)
- Alberta Insurance Council – 1.00 (T)
- Insurance Councils of Saskatchewan – 1.00
- Insurance Council of Manitoba – 1.00
- Chambre de la sécurité financière (Québec) – 1.00 (T)



Speakers

Catherine Clark

Professional Master of Ceremonies, Catherine Clark Communications Inc

Catherine Clark is the President of Catherine Clark Communications and Special Advisor to Syntax Strategic, providing communications counsel to individuals and corporations.

Catherine is also a nationally respected broadcaster, emcee, and co-founder of The Honest Talk, a popular podcast featuring frank discussions with notable women, sponsored by RBC.

Deeply committed to community service, Catherine writes the Giving Back column for Ottawa at Home Magazine and serves on the boards of The Ottawa Hospital and The Writers' Trust of Canada, whose board she chairs.

The Hon. Candice Bergen, P.C., M.P. (Portage-Lisgar, Manitoba)

Leader of the Official Opposition, Interim leader of the Conservative Party of Canada

The Hon. Candice Bergen was first elected to the House of Commons in 2008 and was re-elected in the 2011, 2015, 2019 and 2021 elections, representing the riding Portage-Lisgar in Manitoba and is currently serving as the Conservative Deputy Leader.

Between 2013 and 2015, Candice served as Canada's Minister of State for Social Development having previously served as Parliamentary Secretary to the Minister of Public Safety. In her role as Minister of State for Social Development, she worked with all provinces and territories to ensure Canada's affordable housing programs were fair to taxpayers and sustainable for those families needing support. She also reformed the government's Homelessness Partnering Strategy towards an evidence-based housing first approach that is producing measurable results in reducing homelessness. As the lead Minister responsible for the Office of Disability Issues, Candice ensured families and Canadians living with disabilities were supported through world-leading programs such as the Registered Disability Savings Plan, Opportunities Fund and Enabling Accessibility Fund.

On November 20th, 2015, Candice was appointed to the Opposition Shadow Cabinet as Critic for the Natural Resources Portfolio. On September 15, 2016 Candice was appointed as Conservative House Leader by Interim Conservative Leader, Rona Ambrose. In August 2017, she was reappointed as the Conservative House Leader by the Party's new leader, Andrew Scheer. Most recently in August 2020, Candice was appointed by Conservative Leader, the Hon. Erin O'Toole, as Deputy Leader. She was reappointed to the role in November 2021.

As Deputy Leader, Candice has been given the task of connecting the Conservative Party with companies expanding their focus on ESG (Environment & Social Governance) to lessen their impact on the environment and attract new, green investment. Conservatives understand that companies, especially in the energy sector, are turning to green governance to make Canada's already clean, ethical energy, even better.

Candice brings extensive experience in both the business and political communities. Prior to becoming a Member of Parliament, she worked in the financial planning industry, and was the Manitoba Campaign Manager



for Stephen Harper's leadership bid for the Conservative Party of Canada. She has also acted as an advisor to several Members of Parliament and served as Chief Organizer for the Conservative Party of Canada in Manitoba.

Candice is also committed to her community and has done extensive volunteer work within Manitoba. She has dedicated her time to various youth groups and has worked with at-risk youth as well adults in correctional facilities. She has also volunteered with the palliative care program at her local hospital, Boundary Trails Health Centre.

Born in Morden, Manitoba, Candice now resides in Oak Bluff, Manitoba with her husband, Michael.

Daniel Blaikie, M.P. (Elmwood-Transcona, Manitoba)

NDP Critic for Finance, Member of the Standing Committee on Finance

Daniel was born and raised in Transcona; a blue-collar neighbourhood of Winnipeg built around the CN shops. He continues to live in Transcona with his wife Janelle and two sons, Robert and Noah.

An electrician by trade, Daniel earned his certification as a construction electrician after completing a Bachelor of Arts degree at the University of Winnipeg and a Master of Arts Degree in philosophy at Concordia University.

Daniel entered politics to fight for an economy that is fair for working people and sustainable for the planet. He brings to the House of Commons his experience working as a Minister's Assistant in the NDP government of Gary Doer, as well as his history as a proud member of the IBEW and active member of the labour movement.

First elected as the MP for Elmwood-Transcona in 2015, Daniel has since served in a number of positions including NDP Caucus Chair. He currently occupies several roles within the NDP, including: International Trade Critic, Critic for Employment, Workforce Development & Disability Inclusion and Democratic Reform Critic.

Erica Dhawan

Award winning keynote speaker & author

Erica Dhawan is an internationally recognized leading authority, speaker and advisor on 21st century teamwork, collaboration and innovation. Named by Thinkers50 as the "Oprah of Management Thinkers", she is the author of two books *Get Big Things Done: The Power of Connectional Intelligence* and *Digital Body Language: How to Build Trust and Connection, No Matter the Distance*.

It's 2021, the world of business is increasingly digital and work practices have changed at a blistering rate. Erica shares innovative strategies to unlock the collective power of teams, build a culture of trust across any distance and create authentic engagement to ensure competitiveness. Rated #1 on the Top Women Keynote Speakers of 2020 and featured as one of the management thinkers most likely to shape the future of business, Erica frequently appears in *Harvard Business Review*, *Fast Company*, and *Wall Street Journal*.

Erica speaks on global stages ranging from the World Economic Forum at Davos to TEDx and for companies such as Coca-Cola, FedEx, Goldman Sachs, Walmart, SAP, and Cisco. She has degrees from Harvard University, MIT Sloan, and The Wharton School.



Julie Dzerowicz, M.P. (Davenport, Ontario)

LPC Member of the Standing Committee on Finance

Julie Dzerowicz is the first female Member of Parliament to represent Davenport, having first been elected in 2015, and re-elected in 2019. She currently sits on the House of Commons Finance Committee. She is also the Chair of the National Immigration and Refugee Caucus, the Vice-Chair of the Canadian Section of ParlAmericas, Co-Chair of the Canada-Mexico Parliamentary Friendship Group, Co-Chair of the Canada-Portugal Parliamentary Friendship Group, Executive Committee of the Canada-Ukraine Parliamentary Friendship Group, Chair of the Canada – Turkey Parliamentary Friendship Group, and Vice-Chair of the NATO Parliamentary Association.

Julie is the child of immigrant parents who fled their respective countries due to poverty, war and discrimination, and who came to Canada to find a safe place to raise their children. Through her parents, Julie learned the importance of hard work and education as a means to achieving one's full potential. Through political leadership and community engagement, she is using all her talents and skills to give back to the country that gave her family a new home.

The core value that is at the heart of everything Julie does is equality. She believes that everyone is equal and should be valued and loved equally. Julie also fundamentally believes in equality of access to opportunity.

During the 43rd Parliament, Julie is proud to have introduced the first guaranteed income bill in the House of Commons in Canada—Bill C-273—An Act to Establish a National Strategy for a Guaranteed Basic Income. If passed, the bill will enable basic income implementation pilots on a large scale in provinces and/or territories across Canada. The success of these pilots will help the federal government understand how best to implement a national program across Canada.

A strong feminist, Julie likes to not only be a strong voice and advocate, but also likes to get things done. For a list of her accomplishments as an MP please see the Key Issues and the Accomplishments section of this website. You are also invited to view videos of Julie speaking on behalf of Davenport residents in the House of Commons.

Prior to becoming a Member of Parliament, Julie spent more than 20 years in increasingly senior level positions in banking and biotechnology. A long-time passionate environmentalist, she co-founded Project Neutral in 2010, an environmental organization dedicated to helping individuals and communities reduce their carbon emissions.

Julie received her MBA at the University of British Columbia (completing the degree at the London Business School) and her Bachelor of Commerce at McGill University. She speaks conversational French and Spanish and is working on her Portuguese!

The Hon. Ed Fast, P.C., M.P. (Abbotsford, British Columbia)

CPC Shadow Minister for Finance, Member of the Standing Committee on Finance

Ed Fast was first elected to the House of Commons in 2006, and was re-elected in 2008, 2011, 2015 and 2019. He had previously served for two terms as an Abbotsford School Trustee and for three terms as a member of



Abbotsford City Council. A graduate of the University of British Columbia, Ed practiced corporate and commercial law in Abbotsford for 24 years.

On May 18, 2011, former Prime Minister Stephen Harper appointed Ed to his cabinet to serve as Minister of International Trade. He assumed responsibility for development of the Government of Canada's Global Markets Action Plan, which created a more competitive Canadian economy by deepening Canada's trade and investment ties in dynamic and fast-growing economies around the world. His accomplishments include free trade agreements with the European Union, South Korea, Ukraine and negotiations on the recently-concluded Comprehensive Progressive Trans Pacific Partnership (CPTPP). He also oversaw negotiations on modernizing free trade agreements with Israel and Chile. In the fall of 2015, Ed became Canada's longest serving Trade Minister.

Prior to his appointment to cabinet, Ed served as a member of the Standing Committees on Canadian Heritage, and Transport, Infrastructure and Communities, and as Chairman of the Standing Committee on Justice & Human Rights.

Ed's Private Member's Bill C-277 to amend the Criminal Code to increase from 5 to 10 years in prison the maximum sentence for luring children over the Internet for sexual purposes received Royal Assent in 2007 and became the law of Canada.

In 2011, he was appointed Queen's Counsel for British Columbia, and has received the Queen's Diamond Jubilee Medal for service to his community and country.

Ed and his wife Annette have lived in Abbotsford BC for over 38 years. They have four daughters, four sons-in-law, and nine grandchildren.

Lauchlin MacEachern

Director, Domestic Corporations and Resource Income, Tax Legislation, Finance Canada

Lauchlin is responsible for the domestic corporate reorganization rules, including section 84.1 of the Income Tax Act and the current consultation on the amendments introduced by Private Members Bill C-208.

James MacGowan, FCPA, FCA, TEP

Tax expert; Retired from Deloitte

Jim recently retired as the senior tax partner in the Deloitte Atlantic practice. Prior to retiring, he was one of the leading private company tax practitioners in the firm serving high net worth clients across the country. Previously, Jim spent five years in Calgary as the Managing Partner of the Alberta Private Company Services practice. In this capacity, Jim oversaw the delivery of all professional services to some of the largest private companies in Western Canada. During the same period, Jim was also the national leader of Deloitte's Private Company Service Tax practice, the largest of its kind in the country. Before his time in Calgary, Jim was the Director of Operations of the Atlantic tax practice of Deloitte and a member of the National Tax Executive Committee of the firm.



In retirement, Jim continues to serve high net worth clients across the country. In particular, he specializes in providing advanced tax planning for private companies and the shareholders, tax and estate planning for high net worth clients with a special emphasis on life insurance planning.

Jim also gives back to the local community where he sits on the Board of Trustees for the YMCA of Greater Halifax. He is also Vice Chair of the board of directors of Alcare Place, and a board member of The Healthy Tomorrow Foundation.

Jean François Ménard

Mental Performance Coach and Bestselling Author

Jean François Ménard is widely recognized for his contributions to the field of performance psychology. While doing his PhD in Sports Psychology at the University of Ottawa, Jean François decided to run away with the circus, joining the world-famous entertainment company Cirque Du Soleil. In collaboration with a highly specialized multidisciplinary team, his mission was to coach circus artists the mental skills required to deal with pressure and perform at their best consistently, on demand, up to 450 times a year.

Five years later, he founded Kambio Performance, a company specialized in mental training and leadership coaching. He has since become one of the most sought-after mental performance specialists in the country, working with Canada's top athletes such as Olympic gold medalists Scott Moir, Tessa Virtue, Mikael Kingsbury, Damian Warner, and Derek Drouin; Super Bowl champion Laurent Duvernay-Tardif; Xgames phenom Maxence Parrot. During the 2016/2018/2020 Olympic Games, his clients stepped on the podium eleven times: five golds, two silvers and four bronzes. His clients are also NHL superstars, surgeons, popstars, and corporate leaders.

He is the bestselling author of "Train Your Brain Like an Olympian", a radio personality, and an accomplished speaker who travels the globe to share his knowledge with top-performing organisations like NASA, Redbull, Western Union, FBI, Cisco, PepsiCo, SunLife Financial, Toronto BlueJays and Novartis.

Stephen Poloz

Special Advisor, Osler; Former Governor of the Bank of Canada

Stephen is a widely recognized economist with nearly 40 years of experience in financial markets, forecasting, and economic policy, including 35 years in the public sector.

Prior to joining Osler, Stephen was the 9th Governor of the Bank of Canada, Canada's central bank. Stephen was Governor of the Bank for seven years after having previously spent 14 years there during 1981-95 occupying a range of increasingly senior positions.

Stephen is also the author of the upcoming book titled *The Next Age of Uncertainty: How the World Can Adapt to a Riskier Future* that maps out the powerful economic forces that are shaping our future and the ideas that will allow us to master them.

Prior to joining the Bank of Canada, Stephen spent 14 years at Export Development Canada, as Chief Economist (1999-2008), Head of Lending (2008-2011) and finally as President and CEO (2011-2013). He also spent four



years at BCA Research, where he was Managing Editor of the International Bank Credit Analyst, one of their flagship publications.

Stephen is a Certified International Trade Professional and a graduate of Columbia University's Senior Executive Program. He has been a visiting scholar at the International Monetary Fund in Washington, D.C., and at the Economic Planning Agency in Tokyo, Japan. He is a frequent speaker and writer and has taught economics at the University of Western Ontario, Concordia University and Queen's School of Business.

At Osler, Stephen provides clients with his significant expertise and strategic guidance regarding the financial system, trade, and economic policy both domestically and on a global scale.

The Hon. Lisa Raitt, P.C.

Vice-Chair, Global Investment Banking, CIBC Capital Markets

The Honourable Lisa Raitt joined CIBC Capital Markets in January 2020, having previously worked in both the public and private sectors. Ms. Raitt's current focus is on senior client coverage and business development with clients in the energy, infrastructure and industrial sectors, which align closely with her deep expertise.

Prior to her current role, Ms. Raitt was the President and CEO of the Toronto Port Authority. She was elected into the House of Commons in 2008, where she went on to hold three senior portfolios serving as Minister of Natural Resources, Minister of Labour, and Minister of Transport. Most recently, Ms. Raitt was the Deputy Leader of the Official Opposition and the Conservative Party of Canada.

Ms. Raitt holds a Bachelor of Science degree from St. Francis Xavier University and a master's degree in Chemistry from the University of Guelph. She possesses an LL.B from Osgoode Hall Law School and was called to the Ontario bar in 1998. In 2020 Ms. Raitt was named a Woodrow Wilson Center Global Fellow of the Canada Institute.

Tarsem Basraon

Co-founder, Planworth

Tarsem Basraon is a co-founder of Planworth, a next generation financial planning software. Tarsem is an expert in tax and high net worth planning. After practicing tax and estate law with a leading national law firm, he worked as a High Net Worth Planner at a Big 6 Bank in its investment advice channel. Tarsem has been featured on numerous media outlets including BNN, Toronto Star, MoneySense and CBC.

Jason Boudreau, CLU, CFP

Principal, VELA Wealth Management Inc.

Jason has built VELA Wealth into an established life and estate planning firm, guiding families as they make meaningful choices at the intersection of life and wealth.

More specifically, Jason's areas of expertise include intergenerational wealth transfer and estate planning with a focus on advanced insurance-based solutions that incorporate philanthropy and legacy planning. Leveraging



these specialties, he brings a fresh perspective and outside-the-box thinking to the strategic planning process. His satisfaction comes from watching clients fulfill their vision of life and create impact with their wealth, knowing that VELA played a role in bringing that vision to fruition for the benefit of current and future generations.

Jason is a long-standing, active member of CALU (The Conference for Advanced Life Underwriting), the leading advocacy group promoting the financial health of Canadians and influencing sound public policy. He is a sought-after speaker and contributor to a number of regular publications.

Jason supports the community as an active member of the Rotary Club of Vancouver and board member of the Thunderbird Football Association.

Ian Burns

Partner, David Burns & Associates

Ian Burns has been a partner at David Burns and Associates for over 17 years, after having taken over his father's business in 2015 along with his siblings Jennifer and Matt. He is the fourth generation to enter the insurance field and specializes in employee benefits, life insurance and group savings plans. He is a graduate of both Queen's University and Lakehead University in history, English and education. He also has his life and mutual fund license.

Rod Burylo

Director, Board Advisor, Consultant

Rod Burylo has worked throughout the financial services industry for a wide range of organizations including Royal Bank, Investors Group, and for a number of specialized investment and planning organizations in roles that include Financial Planner, Branch Manager, Chief Compliance Officer, and Board Director.

Rod is an Advisor of the Year Award winner, Champion of Financial Literacy Award finalist, international speaker and author of three books, including his most recent: *The Wealthy Buddhist*. He has been writing, speaking and teaching about applied ethics for over 35 years.

Rod currently works for financial services and accounting businesses as a board advisor on topics related to corporate ethics, compliance, governance, private capital and investment management.

Charlie Conron

President, Life Design Analysis

Charlie is the President and Founder of LDA; a software created to help insurance advisors, distributors and carriers communicate insurance solutions more easily and effectively. Charlie's background is in mechanical engineering, however, when recruited to the insurance industry by his stepfather (a 50-year producer) to see what technology could do for his practice, Charlie saw insurance from the perspective of the consumers and recognized an opportunity to streamline in how insurance was sold. Charlie created Life Design Analysis



software, a web-based platform in 2014. The business has grown significantly with products spanning from independent advisors, wealth management firms, banks & insurance companies all benefiting from increased productivity, revenue and compliance. In his spare time, Charlie enjoys golfing, cooking and spending time with his wife and two kids.

Cindy David, CFP, CLU, FEA, TEP

President & Estate Planning Advisor, Cindy David Financial Group LTD

Cindy David is a leading Canadian financial expert and trailblazer in her industry. She's known for her passion, creative thinking, and determination to influence positive change. She transformed a traditional corporation's employee-employer relationship into a modern structure that provides better benefits to both; and she actively supports women to achieve their dreams of entrepreneurship. She co-authored Financial First Aid for Canadian Investors: Stop the Bleeding, Start the Healing and Get Your Portfolio on the Road to Recovery, a guide to help Canadian investors regain their footing after the financial meltdown of 2008.

As President of Cindy David Financial Group Ltd., Cindy works with business owners in BC and retired or retiring clients, her firm provides tax-effective solutions and expertise, and tailors customized, personal financial planning services to meet the life goals of her clientele.

An "Award of Excellence" was presented to her in 2008 by Manulife, for being one of the top three estate planners in the country. Cindy is the youngest individual to have achieved this distinction. In 2014 she was listed in a Special Report of the Insurance Journal as one of the top 50 Women of Influence in Canada's insurance industry. Most recently, Cindy David Financial Group Ltd. was selected as a finalist in the 15th Annual STEP Private Client Awards in the Boutique Firm of the Year category. As one of only two Canadian finalists this year, The STEP Private Client Awards are seen as the hallmark of quality within the private client industry. Open globally to both STEP members and non-members, these prestigious Awards recognize and celebrate excellence. She is a regular contributor to industry panel discussions and uses these platforms to highlight how women can succeed in the financial sector, all while balancing family and community commitments.

Currently, Cindy serves on three boards: current Chair of the Conference for Advanced Life Underwriters (CALU), and as a general director for the National Board for Junior Achievement and the Insurance Council of British Columbia. In these roles, she works to help small business owners in Canada, advocate for women, and support youth to become financially literate. A Type I Diabetic, she actively fundraises for juvenile diabetes research. She also sits on two advisory boards: Advisors Edge and Advantage BC.

Todd Fithian

Co-Founder & CEO, The Legacy Companies

Todd Fithian has nearly three decades of experience in the financial services industry. Following in the footsteps of three generations, Todd knew at an early age his calling was not only to work in the industry as an advisor, but to work to improve it as well. A lifelong entrepreneur, Todd formed his own wealth advisory firm in Boston soon after graduating from college. In 1996, he joined forces with his late brother Scott as Co-Founder of their next venture, The Legacy Companies, an industry leading training and coaching organization focused on advisor



growth. In 2006, following the loss of his brother and mentor due to cancer, he was left at the helm of their joint venture, when he decided to pursue his passion for evolving the financial services industry and sold the advisory business.

Today, as the CEO of Legacy, Todd provides the vision and leadership for his team. Under his direction, Legacy has revolutionized how advisors engage and serve their clients using Legacy's trademarked approach that allows advisors to discover what matters most to clients and why it's important, before jumping into how to solve it. Fithian calls these Above the Horizon™ Conversations and has trained and coached thousands of financial advisors across the United States and Canada in deploying these approaches to drive measurable growth.

In 2007, Fithian co-authored his first book *The Right Side of the Table: Where do you sit in the minds of the Affluent* (update release date June 2022). In 2011, he wrote *The Future of You: Providing Clarity Where Life Intersects Wealth*, in collaboration with 19 members of his Advisor Growth Network. His work has been published in numerous trade magazines over the years including *The Wall Street Journal* and *USA Today*. Todd is nationally recognized for his contributions to the industry and is a frequent speaker at industry conferences and private events throughout North America.

Mark Foerster, MBA, CFP

Consultant, Empire Life

Mark is a highly organized and successful professional drawing upon forty years of life and health insurance & banking executive experience. He collaborates creatively, cross-functionally across organizational levels to build consensus, to design strategies and plans crafted for ultimately impactful implementation.

Heidi Hauver, CHRE, CPHR, CCP

Vice President, People Experience, Shinydocs

Heidi is an innovative and strategic people leader at Shinydocs, a company focused on making it easier to locate, secure and understand data. Heidi partners with innovative companies to provide executive leadership in human resources with over twenty years of experience in multiple industries. Focused on transformational HR, since 2007, she has founded an HR practice and built three HR departments for companies from the ground up.

Heidi's energetic leadership and constant innovation have earned her several awards, including an Alumni of the Year Award (Business) with Algonquin College, the inaugural nationally recognized 2018 Leadership Agency Award for Woman of Distinction, a 2017 Top 25 HR Professional, a 2012 Ottawa Business Journal/Ottawa Chamber of Commerce Forty Under 40 Award, and a 2012 CATA Information Technology Strategic HR Leadership Award.

Heidi is a Certified Human Resources Executive, a Chartered Professional in Human Resources and a Certified Coach Practitioner. She is a dedicated volunteer and community building who supports a variety of organizations including Algonquin College, Hire Immigrants Ottawa, Women in Communications & Technology, and the Children's Hospital of Eastern Ontario (CHEO).



Chris Ireland, CPA, CA, TEP

Senior Vice-President, Planning Services, PPI Advisory

Chris is responsible for PPI Advisory's national planning services team which provides advanced professional expertise and support in financial, estate and succession planning. He joined PPI in 2003 with over 20 years of experience in tax, estate and trust planning including several years as a tax partner in the Vancouver office of an international accounting firm.

Chris has taught and coordinated the CICA specialized tax course, "Advanced Tax Issues for the Owner Managed Business" and has written extensively in the area of tax planning and wealth preservation.

Chris is a member of the Conference for Advanced Life Underwriting (CALU), the Canadian Tax Foundation (CTF) and the Society of Trust and Estate Practitioners (STEP). He is the former chair of the STEP Vancouver branch and is currently on the board of STEP Canada. Chris is a frequent speaker at tax conferences and professional industry meetings.

Jennifer Jacobs, CLU, CFP, CHS, RHU, IFIC

Insurance Consultant, LTCI Consulting Inc.

Jennifer has specialized for more than 20 years in advising, implementing, and servicing holistic financial planning and protection solutions for clients through direct and advisor partnership services. With strong team support through LTCI Consulting Inc, she is able to work closely with each client to provide a perspective on long term planning issues that extend beyond the conventional strategies used.

Jennifer and the team at LTCI Consulting Inc are a nationally recognized resource, promoter and specialists in living benefits and long-term care planning.

Jennifer's passion is contagious, and approach is straightforward: straight talk. Indeed, her direct but ultimately compassionate style, as well as her continual ranking among the top specialists nationally, made her a sought-after keynote speaker by prominent organizations such as PPI, MDRT, CALU, Advocis, HollisWealth, Desjardins Insurance, Sun Life Financial, Investors Group, BNI, Estate Planning Council and elite independent study groups.

Jennifer is a past board member and current member of the Living Benefits Committee for the Conference of Advanced Life Underwriters (CALU). Jennifer is a Certified Financial Planner (CFP®), Chartered Life Underwriter (CLU), Certified Health Specialist (CHS) and an Elder Planning Counselor (EPC).

Ian Jeffrey

Co-Founder & CEO, Breathe Life

Ian Jeffrey is the Co-Founder & CEO of Breathe Life, a North American InsurTech. An entrepreneur with over 20 years of experience launching and scaling businesses in Montreal and Silicon Valley, Ian grew up watching his father, an insurance advisor, and understood from an early age the power that these products could have. He never thought he would get into insurance, but now, as a father of 2 young boys, he is driven by having a positive impact in people's lives. He was formerly VP Product Marketing at PasswordBox and took on the role of



General Manager after the acquisition by Intel. He has played a key role in the launch of several startups and Co-Founded FounderFuel, Canada's leading startup accelerator, as well as MTLinTech, Montreal's voice of the startup community.

Adam Kelly

Executive Vice President & Chief Commercial Officer, CloudMD Software & Services Inc.

With over 20 years of experience in health and wellness, Adam has a personal and professional commitment to drive change and innovation in how the health of people and organizations are supported. He continuously advocates for better connected care for individuals while strategic driver of better business performance.

Adam has worked in leadership positions across portfolios that include EAPs, mental health, disability, occupational health, and benefits. Prior to CloudMD's acquisition of MindBeacon, he served as the President and Chief Commercial Officer, Canada at MindBeacon where he continued the mission to make evidence based mental health care accessible to North Americans. Prior to joining MindBeacon Group, he was a Senior Vice President within the Health & Productivity Solutions practice at Morneau Shepell, where he supported hundreds of national and regional clients with health and productivity programs targeting cost reduction, cost avoidance, employee and supervisor engagement, as well as attendance and absence management.

Laura Klaehn, CLU, CFP, TEP, CDFA, CHS

President, Vision Financial Partners Inc.

Laura has been in the financial planning/insurance industry for over 30 years and founded Vision Financial Partners over 20 years ago. She saw the need for a boutique firm that specializes in advanced strategy work. Her mission has always been to work in partnership with like-minded advisors so she can focus on problem solving instead of prospecting.

Her background in math, product and strategy development is sought after by leading financial advisors across Canada. And together, they work towards providing honest strong advice to their clients.

When not running the numbers or consulting with clients, Laura is an uber driver for her children. She also enjoys running, going to the cottage and drinking wine.

James W. Kraft, CLU, CFP, CH.F.C., TEP, CPA, CA, M. Tax

Advisor, BMO Financial Group

Jim offers his clients informed insight across many estate planning issues, leveraging advanced market experience – more than 30 years of specialized tax, estate, and insurance expertise – and a unique understanding of the financial and emotional complexities of family wealth. Integral to his value-add approach is a focus on aligning clients' needs with his extensive network of professionals; creating opportunities to deepen existing relationships and enhancing the experience for the duration of the relationship.



Mike McClenahan, GBA

Vice President, Partner Solutions, Benefits by Design Inc.

Mike McClenahan is a VP of Partner Solutions with People Corporation. In his role, Mike strategizes and develops innovative group benefits solutions to help working Canadians and their families stay healthy, happy and financially secure. Mike is also the President of TPAAC (Third Party Administrators Association of Canada). TPAAC strives to act as a collective voice to create a financially strong third-party administration industry in Canada.

A regular face in the Port Coquitlam community, Mike spends his downtime volunteering for motionball, an organization that raises awareness and funds for the Special Olympics Canada Foundation, and exploring the outdoors in his home province of British Columbia.

Brian McGuire, BA, CFP

Partner, Peacock Sheridan Group

Brian McGuire is a partner with Peacock Sheridan Group. Together with his team, Brian works with incorporated professionals, business owners, and family businesses to provide valuable financial and business development advice. The work that they do allows their clients to focus on what they do best, run their companies. Brian obtained his Certified Financial Planner designation in 2014 and is currently working on completing his Chartered Investment Management designation.

Prior to joining Peacock Sheridan Group, Brian worked in banking and then with a prominent financial planning firm in Vancouver. With Peacock Sheridan Group, Brian brings his wealth of financial planning experience to compliment the team and add value to our clients financial planning needs.

Steve Meldrum CLU, CFP

Corporate Insurance Specialist, Swell Private Wealth

Steve is the insurance guru at Swell Private Wealth Ltd. He's a contrarian by nature and loves getting into the weeds of tax. The lion share of his practice is training accountants how to properly structure insurance solutions and products for corporations and estate planning. He helps you crush tax both now and in the future for your high net worth and ultra-high net worth clients. When there's a challenging problem to solve, he dives all in to bring value to the table.

His approach is direct, clear and clarifying as he believes in rowing the boat of strategy towards the client's end game goals. He obtained his Bachelor of Management degree from the University of Lethbridge and studied international finance at the Universidad de Panamericana in Guadalajara Mexico.

Over the years, Steve has become an authority within the Canadian insurance industry and is a frequent contributor to industry publications and events. He believes that simplicity brings clarity and seeks to answer tax, estate and legacy complexities through this lens.



Dana Mitchell, CLU, CFP, CHS

Certified Financial Planner, Basis Wealth

Dana Mitchell is the Principal of Basis Wealth Inc. and in her 18th year in the wealth planning industry.

Basis Wealth Inc., located in Toronto Canada, creates comprehensive financial plans for their clients that include insurance as well as wealth accumulation planning. In addition to her Bachelor of Commerce, Dana is a Certified Financial Planner and Chartered Life Underwriter. She is a proud member of The Conference for Advanced Life Underwriting (CALU) and is an 8 year member of The Million Dollar Round Table with two Court of the Table and 1 Top of the Table Qualification

Dana is a mom, a wife and a business leader in the area of financial services. She is passionate about advancing financial education and enjoys volunteering her time in support of various organizations that support that cause including Junior Achievement.

Laura Money, CLU, CFP, CHS

Senior Financial Planner, Coutts Financial Services Inc. (Sun Life)

Laura, in her role at Coutts Financial Services, is passionate about using comprehensive financial planning to help clients, their families and businesses make the most of their money. With her analytical expertise and knack for explaining complex concepts in simple terms, she shows clients how to take full advantage of insurance, investment, tax, and estate-planning strategies. Her planning provides clients with clarity about their current and future financial picture, confidence to make informed decisions and comfort knowing that what they value most is protected.

Laura specializes in planning for both new and established businesses, tax-efficient retirement income planning and the transfer of family wealth. She was a finalist for the 2018 Women in Wealth Management Young Gun award and the 2020 John A. Tory award winner.

Kim G.C. Moody, FCPA, FCA, TEP

CEO, Moodys Tax/Moodys Private Client

Kim G.C. Moody is a tax specialist practicing in Calgary as the CEO / Director Canadian Tax Advisory with Moodys Tax Law LLP / Moodys Private Client LLP. His main area of expertise is tax and estate planning for the owner-manager of private corporations, executives, professional athletes and other high net worth individuals.

Kim is a Past Chair and Past Deputy Chair of the Board, Past Treasurer, as well as Past Chair of the Technical Committee for the Society of Trust and Estate Practitioners of Canada (STEP). In addition, Kim is a past Chair of the Board of Governors for the Canadian Tax Foundation. He is also a member and Co-Chair of the CBA/CPA Canada Joint Committee on Taxation and a member of The Canadian Petroleum Tax Society. Kim has a keen interest in planned charitable giving. He is a past Chair for the Southern Alberta Round Table for the Canadian Association of Gift Planners. Kim is a co-founder of the Tax Specialist Group – an association of tax specialist firms across Canada. Kim is a recipient of the Queen Elizabeth II Diamond Jubilee Medal, the Business in Calgary



2012 Leader of Tomorrow Award, and in 2013 was conferred the Fellow of the Chartered Accountants of Alberta designation. He is also a recipient of the STEP Founders Award for Outstanding Achievement which was conferred in 2013.

Kim is the author of numerous articles, papers and courses on tax and estate planning and he has lectured extensively for a number of organizations on tax, estate planning and planned giving, including STEP and the Canadian Tax Foundation. He is a past instructor for the Certified Financial Planners designation and is a current tax instructor for the Chartered Professional Accountants of Alberta Professional Development Program.

Murray Neilson, CFP, CLU, CH.F.C., FEA

Business Development, Nicola Wealth Management

A highly regarded advisor, business leader, speaker and moderator, Murray works tirelessly to help his clients rise to their potential and expect more from life. He has over 40 years of experience helping CEOs and entrepreneurs plan and achieve their goals through sophisticated wealth management and planning strategies.

Murray has a tremendous talent for bringing together diverse groups of people to problem solve, collaborate and accelerate goal achievement. Combining listening, leadership and questioning with a strong sense of fun, Murray brings tremendous passion and dedication to all aspects of work and life.

Murray leads client development and relationship management for Nicola Wealth Management, a full-service wealth planning firm for high net worth families and individuals. Murray is a Chartered Life Underwriter (CLU), Chartered Financial Consultant (CHFC), Chartered Financial Planner (CFP) and a Family Enterprise Advisor (FEA). He is called on each year to facilitate the highly anticipated, industry leaders panel at the annual CALU conference.

Community contribution is very important to Murray, and he has been involved in many different industry and community organizations and events over the years. Murray lives in Vancouver, where he was born and raised, and where he and his wife Patty have raised their three children. He is an avid tennis player and proud grandfather of 11 amazing grandchildren.

Michael Noc, CLU, CFP, CH.F.C., CIM

Financial Planner, MTM Wealth Planning Ltd. / iA Private Wealth

Michael was first introduced to the business in 1988 when he joined London Life as a financial advisor. Since then, he has built an independent financial practice, MTM Wealth Planning Ltd. Throughout the years he has helped many people and businesses get on track to achieve their financial goals.

Michael is also proud to belong to the Financial Planners Standard Council; whose main duty is to make sure financial planners keep up to date with industry developments. As an independent member of this monitoring agency, he is better equipped to act in his clients' best interests.

Michael's area of expertise is comprehensive financial planning for professionals and business owners. He designs each plan individually, integrating all special circumstances and needs.



Barry Pascal, MFA-P, TEP, FEA

Partner, Bell Pascal Insurance Services

Barry Pascal is a partner at Bell Pascal Insurance Services, specializing in estate planning and the funding of shareholders agreements for entrepreneurs and high net worth families. With over 35 years of experience advising high net worth families and entrepreneurs in estate and succession planning, Barry has a reputation for technical excellence without losing sight of the big picture. Barry is frequently called upon to speak about life insurance, estate tax planning and the funding of shareholder's agreements. He was an instructor for the Quebec Order of Chartered Accountants for 10 years.

Barry is proud to serve as vice-chair of the Conference for Advanced Life Underwriting (CALU) and is chair of the 2021 Annual General Meeting. He is a fellow of the Society of Trust and Estate Practitioners (STEP), a Master Financial Planner – Philanthropy through the Canadian Association of Gift Planners and a member of the Association de Planification Fiscale et Financière (APFF).

Barry feels enormous gratitude to his community and is inspired to give back. He is proud to have helped create the Jewish Chamber of Commerce (1995). He has also acted as co-chair of McGill University's Goodman Cancer Research Centre Gala, Chairman of the Annual Campaign of Federation CJA (2015), and as President of the Jewish Community Foundation (2010-2011).

Brent Peacock, BA, CHS

Partner, Peacock Sheridan Group

Brent Peacock is the co-founder of Peacock Sheridan Group, an independent wealth planning firm, based out of Kelowna, B.C. Brent, along side his partners and team, have one singular commitment; to help their business and professional clients protect and grow what they have built. They do this by always putting solutions and relationships before profits, and delivering transparent and meaningful advice.

Brent has been a member of the CALU since 2003, and is a life qualifying member of the Million Dollar Round Table (MDRT).

In addition to his commitments at Peacock Sheridan Group, Brent has been kept busy as the founding partner of the Metro Liquor Group. Metro Liquor was founded in 2005, and prides itself on being an education-focused chain of specialty liquor stores with locations in Kelowna, West Kelowna, Victoria and Vancouver. Metro Liquor is a thriving business that employs over 60 people with sales in excess of \$22 million annually.

Brent was born and raised in Kelowna, BC and has spent his life giving back to the community he loves. Brent has dedicated a great deal of time to the Kelowna General Hospital Foundation as a previous full-term board member (2005-2011), and annual donor. Alongside his colleagues at Peacock Sheridan Group, he continues to contribute to numerous charitable causes including The Heart of Gold Gala, Canadian Blood Services, The Boys and Girls Club, Brain Trust Canada, and most recently, the Child Advocacy Center in Kelowna, an organization that is dedicated to supporting children and families that have been impacted by child abuse.



Cindy Radu, LL.B, LL.M. TEP, ICD.D

Family Wealth Transition Advisor, Cindy Radu Advisory Ltd.

As an independent family wealth transition advisor, Cindy helps individuals, family enterprises, business owners and family offices navigate the complexities and opportunities that come with wealth. In her practice, Cindy draws on over 30 years of legal, fiduciary, trust and governance experience in professional services firms, financial institutions and family offices. She uses her skills to provide an objective perspective and facilitate understanding of how complex family, business and ownership structures can impact family dynamics and family wealth continuity.

Cindy is chair of the STEP Worldwide Business Families Global Steering Committee and was awarded STEP Private Client Awards – People’s Choice Trusted Advisor of the Year in 2018/19.

Jeremy Reinbolt, CLU, CIM

President & Chief Financial Advisor, Videre Financiers Inc.

Jeremy’s deeply passionate about working with business families and his areas of expertise include Integrated Planning, Estate Planning, Insurance Planning, Risk Management, Asset Allocation and Portfolio Management. Jeremy is active in the Vancouver business community and an alumni member of the Entrepreneurs Organization. Jeremy has successfully completed Wharton’s M&A program, and Harvard’s Private Equity and Venture Capital Program. He has been published in Harvard Business Review and has been an advisor on Enriched Academy.

Jeremy lives in Vancouver with his young daughter Scotia. He travels all over Canada working with entrepreneurs and their families. He and his daughter love to explore new countries and learn from different cultures. He is also very passionate about health and longevity.

Angela Ross, TEP, LL.B.

Principal, Tax Services, PricewaterhouseCoopers LLP

Angela is a Principal in Family Enterprise Services at PwC specializing in high net worth tax consulting. Working exclusively in tax planning, Angela is responsible for providing sophisticated estate planning services to shareholders of private and public companies and to other wealthy individuals and families. She advises on will and probate fee planning, tax planning for estates, charitable giving strategies, immigration and emigration planning, the use of domestic and offshore trusts and their taxation, buy-sell planning, estate freeze and capital gains exemption planning techniques, creative uses of insurance and distribution planning for corporations and trusts.

Angela has over 20 years of experience in providing high-end tax advice and planning to clients. Angela graduated with an LL.B. from the University of Toronto and was called to the Ontario Bar in 1997. While no longer practising law, she did practice for over 9 years as a tax lawyer in both an in-house counsel role and in a top-tier Toronto law firm. She is a member in good standing at the Law Society of Upper Canada, a member of



the Canadian Tax Foundation, Ontario Bar Association, Law Society of Upper Canada, and the Society of Trust and Estate Practitioners.

Angela is currently a tax advisor to the Conference for Advanced Life Underwriting (CALU) and has spoken at a number of conferences for the Society of Trust and Estate Practitioners, CALU, Senior Estates & Trusts Practitioners' Forum, and the Law Society of Ontario on various estate planning topics. Angela has also authored articles for the Canadian Tax Foundation, CALU and Federated Press.

Russell Shaw

Senior Director Individual Life and Health New Business Operations, RBC Insurance

As the Senior Director of Individual Underwriting, Russell Shaw is responsible for the risk decisions for all fully underwritten CI and DI business at RBC Insurance in addition to having overall responsibility for the individual insurance operations.

Like many professionals in the insurance industry, underwriting was not his first career choice. After graduating from the University of Toronto with a Bachelor's degree in Criminology, Russ worked with, youthful offenders at a detention and custody facility with a longer term vision of pursuing a career in the field of probation and ultimately law school. Four years later, he found himself in search of new challenges and in 1998, took a job as an underwriting trainee with Paul Revere/Provident, now RBC Insurance. He has occupied several roles within the RBCI organization in Underwriting, Corporate Underwriting, subject matter expert for a large-scale project, and most recently, Senior Underwriting Director. Russ is very active in the underwriting community and is a past board member of the Canadian Institute of Underwriters and the Canadian Association of Living Benefits Underwriters. He currently co-chairs the Canadian Living Benefits Seminar board of directors.

Jake Sheehan, CLU, FEA

Advisor, Life Design Systems

Jake works alongside his father, Joe Sheehan, as they work with affluent Canadians who are challenged by the burgeoning complexity of trying to integrate insurance, investment, tax, estate and retirement planning. They believe their clients need new tools for navigating this environment on their own and in conjunction with their key advisors. Their goal is to clarify what the current equation is, provide a learning platform to model future scenarios and then help everyone involved to make a decision and get back to the things they enjoy doing.

He brings a strong analytical perspective to the Life Design Systems team. Jake developed a unique financial modeling system that gives our clients the ability to see their current situation from a new perspective and to simulate potential life scenarios. Using a visual narrative, they are able to convey complex structures and foster a deeper level of understanding for their clients and professionals.

Jake attended the University of Guelph and graduated from the Bachelor of Arts program in Philosophy with honours. He completed his Family Enterprise Advisor (FEA) and Chartered Life Underwriter (CLU) designations and is currently a Student Member of STEP while working on his TEP designation. He has been a CALU member since 2014.



Roger Sinclair, CFP

Partner, SBW Wealth Management

A 1979 graduate and former member of the Board of Governors of the University of Prince Edward Island, (2000-2006); Roger has provided financial and estate planning services to families, business owners and professionals since 1982. He formed SBW Wealth Management & Employee Benefits with Peter Billard and Rob Weld in 1997. The employee benefits division was merged with Gallagher Benefits in December 2019 and provides employee benefits, retirement plans and human resource counseling services to over 500 companies in Atlantic Canada.

In 2015, Roger was invited to the board of the Conference for Advanced Life Underwriting (CALU). He served as Past Chair of the Board of Directors of CALU for 2020-21 as well as Chair of the Market Conduct committee and the Governance and Nominating Committee. Roger has been a member of the Halifax Estate Planning Council for the past 20 years and has also been a member of Advocis since 1982.

Roger has served two terms as a member of the Board of Directors of Brigadoon Children's Camp Society and was the Chair for the initial Building Brigadoon capital campaign. He is also currently President of The Clan Sinclair Association of Canada. He is a former member of the National Board of Directors of the Canadian Cancer Society and past Chair of the National Planned Giving Committee.

Roger was the 2011 recipient of the prestigious Jack Hopwood Memorial Award, which is presented bi-annually to a Great West Life financial advisor in Canada who has played an outstanding volunteer role in his community, while providing consistent, professional service of the highest standard to his clients.

Tracy To, B.Sc, CLU, CEA

Director of Sales, Sun Life

Tracy enjoys helping advisors with their cases from start to finish. She applies her extensive know-how to help design the case, and provide solutions that meet the needs of both the advisor and their client. Her excellent communication and interpersonal skills are valuable assets in supporting advisors, particularly those working in the advanced markets.

Tracy refined her client relationship skills working in a long-term care facility where she was exposed to the issues facing families and residents. It was this experience that made her acutely aware of how insurance products can provide solutions in people's lives. Her analytical skills, integrity and trustworthiness help her build valued relationships with advisors in the Managing General Agency (MGA) and National Accounts channels in Calgary and Saskatchewan.

A graduate of the University of Calgary, Tracy earned a Bachelor of Science degree in chemistry. She is a member of Advocis and of CALU, and she is proud to be part of Sun Life's team of professionals who help advisors grow their business.



Kevin Wark, LL.B, CLU, TEP

Tax Advisor, CALU

Kevin Wark is a tax advisor at CALU. He has written and spoken extensively on taxation and estate planning topics. He is the author of the popular consumer book entitled *The Essential Canadian Guide to Estate Planning* (2nd Edition) and *The Essential Canadian Guide to Income Splitting Planning*.

Kevin is the editor-in-chief of CALU Report and a regular contributor to the *Advocis FORUM Magazine* and e-magazine, CALU's *INFOexchange* and *Advisor.ca*. He was previously editor-in-chief of *Insurance Planning* published by Thomson Reuters and still contributes to this publication. He is frequently interviewed and quoted in a number of financial publications on issues relating to tax and estate planning.

Kevin is a member of *Advocis*, *The Institute*, the *Canadian Tax Foundation*, *Canadian Bar Association* and the *Society for Tax and Estate Practitioners*. He also sits on the board of the *Royal LePage Shelter Foundation* and in his spare time enjoys writing murder-mysteries.

Samuel Waxman CLU, CFP, CHS, CEA

Life Insurance and Living Benefits Advisor, Waxman Planning

Samuel Waxman is a licensed life and living benefits insurance advisor who has been in financial services since 2011. He focuses on providing insurance and estate plans to recently graduated professionals as well as young families and business owners. Samuel graduated from the University of Western Ontario in 2011 and in 2012, graduated from the Financial Services Practitioner Graduate Program at Seneca College. Samuel currently runs his own practice as a Life Insurance and Living Benefits Advisor at Waxman Planning.